

New Client Checklist

Date: _____

Contact: _____

Company: _____ Title: _____

Phone: Office _____ Mobile _____

Email: _____

Background: _____

Referred by: _____

Circle	Date	Potential Client Instructions	Special Instructions
		Create potential Client folder (Manila)	
		Send: ___ Bio ___ request telephone meeting via email ___ Corporate Profile	
		Schedule ___ 10 minute telephone call ___ Lunch ___ Coffee ___ Face to Face Introduction Session ___ Breakfast ___ Billable Session	
		Confirm Appointment	
		Send: ___ Confidentiality Agreement ___ Client Background Form ___ Corporate Profile ___ Directions	
		Get: ___ Bio ___ Client's company information ___ Resume ___ other	
		Schedule ___ 1.0 ___ 1.5 Session	
		Confirm Appointment	
		___ Update database ___ add to newsletter (web) ___ Add to Group in ACT: _____	
		___ Type up Scope of Work ___ email ___ put in CSR ___ Type up 360° Diagram ___ Send 360° Packet	
		Type proposal and send ___ Career ___ Executive	
		Send gift to reference source ___ book ___ other:	

Check if needed	Initials/ Date	Executive Development Track	Special Instructions
		E-mail Client Info form to Client & ask them to complete <i>2003 SolidExecutive Files\Phase 1 –Assessments\Tab 2 Client Information Forms 5-03.doc</i>	
		Prepare new Client Binder and Folder ___ Executive ___ Career	
		Resume and other client information <i>Collect from Daniel</i>	
		Update Act with Client info & code as Client <i>Under Act Client record-Select ID Status-Client</i>	
		Schedule next session <i>Using Act Calendar</i>	
		Create blue new client folder for SOLID files <i>Blue pressboard folders with dividers</i>	
		Update Excel Monthly Analysis Worksheet (Retainer Log)	
		Update QBP <i>Will do this through Quickbooks</i>	
		Provide PPS Access Code & Instructions <i>2003 SolidExecutive Files\Phase 1 –Assessments\Tab 2- DISC Behavioral Style.doc</i>	
		Bill Credit Card	